Subsidiary INFORMATION PACKET

STUDENT ACTIVITY FEE (SAF) FUNDING REQUEST MATERIAL FOR ACADEMIC YEAR 2015-2016

MICHIGAN TECH UNDERGRADUATE STUDENT GOVERNMENT WAYS & MEANS COMMITTEE (WAM Committee)

Andrey Merzlyakov, President, asmerzly@mtu.edu
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Kyle Yarusso, Member at large, kjuryaruss@mtu.edu
What To Do Before Budget Hearings

1. **Verify that your organization is a Registered Student Organization (RSO).** Only those organizations registered with the Office of Student Activities are eligible to receive Student Activity Fee (SAF) money.

2. **Create a budget.**
   It is important that time and effort is put into budgeting for the next year. The success of your student organization often depends on the effort put into obtaining SAF funding. (Use attached example budget).

3. **Gather financial statements from the past 2 years.** Financial statements should be provided to show the committee what your organization has spent its money on. These should be prepared statements with how much money is left in your account each year and what was actually purchased. Uploading the past two years’ budgets to Involvement Link fulfills this requirement.

4. **Prepare the Funding Agreement and fill out Organization Questionnaire.** The Funding Agreement needs to be signed by all of your officers and advisor in order to receive SAF funding. It shows that you have read and understand the guidelines for the allocation of funds, and that you agree to these guidelines. These guidelines are outlined in Section 7 of the Undergraduate Student Government Bylaws. The Organization Questionnaire helps USG get to know a little more about the logistics of an organization.

5. **Sign up for a hearing time slot.**
   Sign up for a Budget Hearing time slot using USG’s Appointment Calendar. A link to sign up for a Google Calendar Appointment will be sent to your organization on February 16th, 2015. If you have trouble with the Google calendaring system please contact USG at usg@mtu.edu or visit the USG office (MUB 113). Time slots are available on a first come first serve basis.

**Action Items**

a) Upload your organization’s proposed 2015/2016 budget.
b) Upload financial statements from the past 2 years. (Academic years 2013/2014 & 2014/2015)
c) Turn in Funding Agreement sheet with the signatures of the officers to the USG office.
d) Turn in Organization Questionnaire to the USG office.
e) Sign up for a Budget Hearing time slot.

**Take Note…**

Budgets are to be submitted online on Involvement Link. Funding Agreement and Organization Questionnaire are to be turned into the USG office.

COMPLETE Action Items a, b, c, and d, BY 5PM, MONDAY FEBRUARY 16th
Sign up for a time slot (action item e) BY 5PM, WEDNESDAY FEBRUARY 25th

**LATE FUNDING REQUEST PACKETS WILL NOT BE ACCEPTED!**
What To Expect At Budget Hearings

The Budget Hearings will take place in the Datolite Room on the first floor of the MUB Thursday, February 26th through Sunday, March 1st. Please be approximately ten minutes early in case the committee is running early. A member of the Ways and Means (WAM) Committee will let you know when you can come into the room.

Your meeting time with the WAM Committee will be ten minutes. During this time your request will be reviewed and you may be asked questions about items in your budget. You may also receive inquiries about your organization’s activities, income, etc. Please be prepared to answer all questions about your budget and planned activities for the upcoming year. It is very important that you send a member knowledgeable about your proposed budget and the activities of your organization.

USG will not tell you your organization’s allocation at this time. Recommendations will be announced on Wednesday March 4th and sent to the presidents e-mail list. Your organization can come talk to WAM on Thursday, March 19th from 6pm – 10:30pm in the MUB Ballroom for a Budget Appeals Meeting if you have questions about your recommended amount.

Budget hearings are not a scary thing! WAM Committee members receive your budget and financial statements ahead of time and have already looked over your organization’s request. When you come in for your time slot, the members will ask you questions about different items on your budget, for example where a conference is, how dues work in your organization and membership numbers and composition. Student organizations that have a history of not spending all or a majority of their SAF allocation will be asked about this. As long as you send members that are knowledgeable about your organization and the budget you prepare is well-organized as asked, budget hearings should not be a problem.

If your group fails to show up for their time slot, the group will not be given an allocation for the 2015-2016 academic year.

What To Expect After Budget Hearings

The WAM Committee will recommend, to USG, an allocation for your organization. USG will vote on all allocation amounts at the regular weekly meeting on Wednesday March 25th, 2015 at 7pm in MUB Ballroom B. Information of your approved allocation will be available after this meeting. Your organization will be notified in September 2015 of your allocation for the 2015-2016 academic year by a letter from the new USG Treasurer. If you have any questions before, during, or after the hearing, please feel free to ask the USG Treasurer.

Take Note…

Each student organization that receives an allocation has until October 1st of the following academic year to re-register as a student organization with the Office of Student Activities. Any organization that does not register will forfeit their allocation to the Opportunities Fund.

If you have any questions, unavoidable conflicts with the times or dates of the hearings, contact USG at usg@mtu.edu
# Student Activity Fee Funding Request Timeline

<table>
<thead>
<tr>
<th>DATE</th>
<th>EVENT</th>
<th>TIME, LOCATION, NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 27\textsuperscript{th}, 2015</td>
<td>Mandatory Budget Info Session</td>
<td>Fisher 135 6pm</td>
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</table>
| **Monday** February 16\textsuperscript{th}, 2015 | Budget Packets Due  
  • Submit Proposed Budget for 2015-2016 (online)  
  • Submit past financial statements (online)  
  • Turn in Funding Agreement and Organization Questionnaire (USG office) | Submit online items to Involvement Link  
Turn in paperwork to USG Office (MUB 113)  
Complete all items by 5pm  
**Late budgets will NOT be accepted** |
| Monday Feb. 16\textsuperscript{th} – Wednesday Feb. 25\textsuperscript{th} 2015 | Sign up for Budget Hearing Time Slot                                 | Sign up using USG’s Google Appointment Calendar |
| Thursday February 26\textsuperscript{th} – Sunday March 1\textsuperscript{st} 2015 | 10 minute budget hearing with the Ways and Means Committee  
Question and answer session with Ways & Means Committee | MUB Datolite Room (Room 100)  
Thursday 6pm – 10:30pm  
Friday 6pm – 10:30pm  
Saturday 8am – 11:30pm  
Sunday 8am – 11:30pm |
| **Wednesday** March 4\textsuperscript{th}, 2015 | Allocation Recommendations Announced                               | MUB Ballroom B 7pm  
Recommendations made by the WAM Committee will be announced at the USG meeting- public welcome  
Recommendations will also be sent to the Presidents list |
| Thursday March 19\textsuperscript{th}, 2015 | Budget Appeals                                                      | MUB Datolite Room (Room 100)  
6pm – 10:30pm  
A time for questions on recommended allocations |
| **Wednesday** March 25\textsuperscript{th}, 2015 | USG Votes on the Budget for 2015-2016                           | MUB Ballroom B 7pm  
All numbers are recommendations until representatives vote at this meeting |
<table>
<thead>
<tr>
<th>Item #</th>
<th>Revenue</th>
<th>Total Amount</th>
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<tbody>
<tr>
<td>1.0</td>
<td>Membership Dues (20 Members x $1)</td>
<td>$ 20.00</td>
</tr>
<tr>
<td>2.0</td>
<td>Tech Fund</td>
<td>$ 100.00</td>
</tr>
<tr>
<td></td>
<td><strong>Total Revenue:</strong></td>
<td><strong>$ 120.00</strong></td>
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</table>

<table>
<thead>
<tr>
<th>Expenditures</th>
<th>Total Amount</th>
<th>Request Amount</th>
</tr>
</thead>
</table>

**Equipment**

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>Total Amount</th>
<th>Request Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.0</td>
<td>Practice Balls</td>
<td>$ 150.00</td>
<td>$ 100.00</td>
</tr>
<tr>
<td>5.0</td>
<td>Nets</td>
<td>$ 250.00</td>
<td><strong>-</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Total Equipment Cost</strong></td>
<td><strong>$ 400.00</strong></td>
<td><strong>$ 100.00</strong></td>
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**Projects and Activities**

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>Total Amount</th>
<th>Request Amount</th>
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</thead>
<tbody>
<tr>
<td>6.0</td>
<td>Pool Time at SDC</td>
<td>$ 100.00</td>
<td>$ 100.00</td>
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<tr>
<td>7.0</td>
<td>Ice Time at SDC</td>
<td>$ 250.00</td>
<td>$ 250.00</td>
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<tr>
<td></td>
<td><strong>Total Projects and Activities Cost</strong></td>
<td><strong>$ 350.00</strong></td>
<td><strong>$ 350.00</strong></td>
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**Competitions and Conferences**

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>Total Amount</th>
<th>Request Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.0</td>
<td>Game vs UofM in Ann Arbor, MI</td>
<td>$ 200.00</td>
<td>$ 200.00</td>
</tr>
<tr>
<td>11.1</td>
<td>Travel</td>
<td>$ 200.00</td>
<td>$ 200.00</td>
</tr>
<tr>
<td>11.2</td>
<td>Hotel</td>
<td>$ 250.00</td>
<td>$ 250.00</td>
</tr>
<tr>
<td>12.0</td>
<td>Game vs UW-Madison in Madison, WI</td>
<td>$ 200.00</td>
<td>$ 200.00</td>
</tr>
<tr>
<td>12.1</td>
<td>Travel</td>
<td>$ 200.00</td>
<td>$ 200.00</td>
</tr>
<tr>
<td>12.2</td>
<td>Hotel</td>
<td>$ 250.00</td>
<td>$ 250.00</td>
</tr>
<tr>
<td>13.0</td>
<td>Conference in New York, NY</td>
<td>$ 300.00</td>
<td>$ 300.00</td>
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<tr>
<td>13.1</td>
<td>Hotel</td>
<td>$ 300.00</td>
<td>$ 300.00</td>
</tr>
<tr>
<td>13.2</td>
<td>Travel</td>
<td>$ 400.00</td>
<td>$ 400.00</td>
</tr>
<tr>
<td>13.3</td>
<td>Registration Fee (for 5 People)</td>
<td>$ 250.00</td>
<td>$ 250.00</td>
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<tr>
<td></td>
<td><strong>Total Competitions and Conferences</strong></td>
<td><strong>$ 1,850.00</strong></td>
<td><strong>$ 1,850.00</strong></td>
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</table>

**Total Expenses/Request**

<table>
<thead>
<tr>
<th>Description</th>
<th>Total Amount</th>
<th>Request Amount</th>
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<tbody>
<tr>
<td></td>
<td>$ 2,600.00</td>
<td>$ 2,300.00</td>
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Some tips for Creating a Budget

The Ways and Means Committee would like to see budgets broken into three sections:

1) **Projects and Activities** (this includes campus wide activities, advertising, copying, bringing in lecturers, cost of renting movies for Film Board, etc.);

2) **Equipment** (substantial equipment purchases like scuba tanks and computer programs as well as safety equipment);

3) **Competitions/ Conferences/ Symposia** (this includes travel costs, entrance fees, etc). The committee would also like to see, along with the total costs, the requested amounts in each area. For example, an organization might ask the SAF to cover ½ of the cost of a given item.

It is also important to show on your budget all revenue collected including any potential carryover in your individual organization’s account. Any SAF money not spent in one year is NOT carried over into the next school year.

Student Activity Fee money may be allocated to projects and activities, equipment, competitions and conferences. Projects and activities must be open to the entire Michigan Tech student population. Funding may not include alcohol, food or drink expenditures, and items that will not remain with the organization. Equipment must remain with the organization and must be accessible to all members.
Funding Agreement

I have read and understand the guidelines for the Student Activity Fee allocation process. I realize that failure to comply with all aspects of this process could jeopardize the allocation of funding for the organization I represent, and by affixing my signature below agree to all of the rights and duties herein as an executive board member/advisor of the organization I represent, including the responsibility of transferring this knowledge to the next executive board.

President (print) __________________________ (signature)
Email: ______________________________________

Vice President (print) __________________________ (signature)
Email: ______________________________________

Treasurer (print) __________________________ (signature)
Email: ______________________________________

Secretary (print) __________________________ (signature)
Email: ______________________________________

Advisor (print) __________________________ (signature)
Email: ______________________________________

_________________________________________ Organization

_________________________________________ Date
Organization Questionnaire

_________________________________________
Organization Name

Membership Questions:
• Number of Members (Michigan Tech Students only): _______
• Number of Members regularly attending meetings: _______

Organization Questions:
• Are you registered with Student Activities Office? (Circle one) Yes / No
• Is your current constitution submitted to the Student Activities Office? Yes / No
• Does your group have an office? Yes / No
  o If so, where? ____________________________
  o Is it locked / secure when not in use? Yes / No

Financial Questions:
• Does your group use the USG account for printing, phone bill, shipping or anything else? (Circle one) Yes / No
• Are you aware of any balance unpaid? Yes / No
  o If yes, do you know the amount? Yes / No
  o Amount? $________.______ or Unknown
• Did your group use all of its SAF allocation last year? Yes / No
  o If no why?
    □ Didn’t know your group had an allocation or amount.
    □ Didn’t know the USG reimbursement process?
    □ Poor transition of previous offices?
    □ Other reason(s)?________________________________________________________
    _____________________________________________________
• What does your organization provide to the campus community?
  ________________________________________________________________
  ________________________________________________________________
• What are some of your organizations long term goals? Where do you see the organization in 2 years?
  ________________________________________________________________
  ________________________________________________________________